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VOLUME 6, NUMBER 2

Seafood Business

THE MAGAZINE OF SEAFOOD MARKETING AND MANAGEMENT

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SUPERMARKET SURVEY

PACIFIC PACKERS REPORT

DISTRIBUTION SERIES

SALMON

MARCH/APRIL 1987
VOLUME 6, NUMBER 2

Seafood Business

THE MAGAZINE OF SEAFOOD MARKETING AND MANAGEMENT

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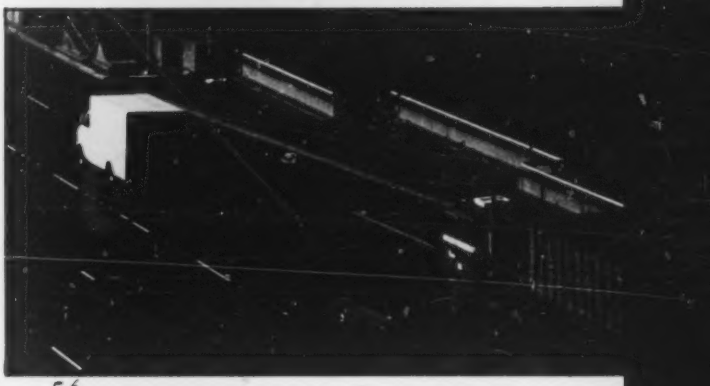

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Cover photograph of Bay State Seafood by Alain Masson.

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PROFILES

PACIFIC PACKERS REPORT

With this issue of Pacific Packers Report, we mark our 85th anniversary. In all our years of reporting on the West Coast industry, we have found the marketing of seafood always a dynamic and exciting process. As for 1986, it was a prosperous year for the seafood business, and the West Coast industry played a major role in that success.

To celebrate our 85th anniversary, we have given Pacific Packers Report a new look and a new feature — a profile of the leaders in the Alaska processing industry. These companies range from pioneers in the canned-salmon industry to leaders in frozen-at-sea technology. All have their heads above the crowd, watching for trends and opportunities. They lead the rest of the nation in targeting new stocks, upgrading processing facilities, and producing and marketing new product lines. We asked the CEOs to share some of their thoughts on growth opportunities in the seafood industry.

As always, PPR will summarize 1986 landings and production for you, but some of the historical tables will be missing. Rather, we'll emphasize through graphs and charts how the recent past affects current and projected market conditions. Our Seattle staff will continue to update the historical tables, which are available for the asking. Write to Seafood Business, 4215 21st Ave. West, Seattle WA 98199. (PROFILES are in **random order**.) □

PROFILES

Unisea, Inc.
15110 N.E. 90th Street,
P.O. Box 97019
Redmond WA 98073-9719
Telephone: (206) 881-8181
Telex: 910-449-2989
FAX: (206) 821-8416
Product line:
snow crab (frozen), king crab (frozen), salmon, herring, blackcod, surimi, halibut, Pacific cod, imitation crab and scallops

J. Richard Pace, *president*

"Due to the abundance of the raw material, the development of products from Alaska pollock and cod will provide the greatest opportunity for future growth."

Unisea survived the crash of king crab stocks in the late 1970s by focusing on snow crab and moving into the production of surimi and surimi-based analogs. Owned by Nippon Suisan Kaisha, Ltd., the Unisea Group includes Dutch Harbor Seafoods, Great Land Seafoods (the surimi plant), Baranof Fisheries, and Courageous Fisheries. Annual sales are estimated at more than $65 million.

Wards Cove Packing Company, Inc.
88 East Hamlin Street
Seattle WA 98105
Telephone: (206) 323-3200
Telex: 328-759
FAX: (206) 323-3200 Ext. 258
Product line:
salmon (canned and frozen), king crab (frozen), tanner crab, *opilio* crab (sections), herring (frozen), salmon caviar, surimi, blackcod, Pacific cod

Alec Brindle, *president*

"Complete Americanization of the fishery resources within the United States' 200-mile limit will allow the U.S. industry to compete better in the growing domestic market."

Subsidiaries include Columbia-Wards Fisheries, Excursion Inlet Packing Company, Red Salmon Cannery, South Naknek Seafoods, and Haines Packing Co. Founded in 1914, Wards Cove is a key producer of canned salmon, but recently entered the surimi market. Alyeska Seafoods, subsidiary of a Wards Cove/Taiyo/Marubeni joint venture, produces surimi in Dutch Harbor. The company employs 2,500 workers in nine plants throughout Alaska.

Nelbro Packing Company
4242 22nd Ave. West
Seattle WA 98199
Telephone: (206) 285-3941
FAX: (206) 282-2499
Product line:
salmon (canned and frozen), herring, salmon roe

Trev Beeston, *president*

"Alaska bottomfish is obviously the big opportunity in terms of a resource. But the shift in consumer attitudes about seafood will probably have a more positive impact in terms of growth opportunities."

Nelbro was formed in 1962 when parent company B.C. Packers purchased the Naknek canning plant. The private-label packer lists phenomenal sales growth of 53 percent since 1980. Annual sales are estimated at $20 million.

Trident Seafood Corporation
5303 Shilshole Avenue N.W.
Seattle WA 98107
Telephone: (206) 783-3818
Telex: 321266
FAX: (206) 782-7195
Product line:
salmon (fresh, frozen and canned), crab, halibut, pollock, cod, herring, swordfish, tuna

Chuck Bundrant, *president*

"Trident Seafoods believes that the opportunities for growth in the next five years will be developed by those processors who can combine close contact to the market and to the fishermen with today's high-volume production and marketing economies."

Trident's merger with ConAgra should strengthen the company's financial clout and, with the additional acquisitions of San Juan Seafoods, Bristol Monarch, and Seawest Industries, broaden the company's processing capacity tremendously. Founded in 1973, the company operates four shore plants and eight floating processors. Under the new conglomerate, annual sales are expected to exceed $200 million.

Ocean Beauty Seafoods,Inc./ Washington Fish & Oyster Company
1100 W. Ewing Street
P.O. Box C-70739
Seattle WA 98107
Telephone: (206) 285-6800
Telex: 4740072 OBEX UI
ITT Line
FAX: (206) 281-5896
Product line:
salmon (fresh, frozen and canned), crab, shrimp, halibut, herring, cod, sole

Victor W. Horgan, *president*

"Growth opportunities for the industry will most likely be in the development of new market forms, new methods of presentation to the consuming public, and the development of underutilized fisheries within the U.S. fishery zone."

Founded in 1910, Ocean Beauty has held its position as a top supplier of canned salmon (more than 380,000 cases last year) as well as a major producer of fresh and frozen seafood. Sales growth since 1980 has been 50 percent, with annual sales exceeding $160 million. The company employs 1,500 seasonal workers in 12 plants throughout Alaska.

Farwest Fisheries, Inc.
100 W. Harrison Plaza,
North Tower, Suite 225
Seattle WA 98119
Telephone: (206) 285-0300
Telex: 32-8886
FAX: (206) 285-0308
Product line:
salmon (canned, fresh, and frozen), salmon caviar

Sam Rubinstein, *CEO*

"Farwest Fisheries believes that the present runs of salmon in Alaska have matured to the point where natural variations in the return will produce sufficient volume so that the canned salmon industry will continue to offer the consuming public the finest possible product in a can."

Farwest was formed in June 1985 when former executives of Whitney-Fidalgo bought the company's canned-salmon production plants and marketing operations. Product from the Naknek and Ketchikan canneries is marketed nationwide under the Whitney, Rubinstein, Faust, Prelate, and Tulip labels. Annual sales are in excess of $40 million.

The Kemp Group
P.O. Box 70647
Seattle WA 98107
Telephone: (206) 283-6808
Duluth: (218) 728-4425
Telex: Duluth 290-751
FAX: Seattle (206) 283-3857
Duluth (218) 728-6566
Product line:
salmon (fresh and frozen), herring, crab delights (surimi crab), all varieties of freshwater fish

Louis Kemp, *president*

"Opportunities abound, limited only by one's imagination and resourcefulness. Best bets: new generations of secondary surimi products for U.S. tastes and needs, groundfish producing and processing, and aquaculture."

The Kemp Group includes Kemp Pacific Fisheries, Kemp Foods, Kemp Paulucci Seafood, and Kemp Fisheries. Annual sales are estimated at $50 million. Company headquarters are in Duluth, where the surimi-based-analog plant is located.

Arctic Alaska
4250 24th Ave. West
Seattle WA 98199
Telephone: (206) 282-3445
Telex: 556763 ARC AK SEA
FAX: (206) 281-8052
Product line:
cod fillets (shatterpack, cellos, blocks), pollock fillets (shatterpack, cellos, blocks), king crab, snow crab, surimi, sablefish, sole, turbot, shrimp, flounder, perch, red snapper (Pacific rockfish)

Terry Baker, *president*

"I see growth opportunities everywhere. With per capita seafood consumption increasing at ten percent per year, any company with a commitment to quality and customer service should do very well in establishing itself in the marketplace."

Established in 1980, Arctic Alaska has become a giant in at-sea processing by concentrating on its role as a supplier (some 90 million pounds last year). Sales growth since 1980 has been 25 percent. The firm operates 13 processing facilities and employs 600. Estimated annual sales are $50 million.

Peter Pan Seafoods, Inc.
1000 Denny Building,
Sixth and Blanchard
Seattle WA 98121-1820
Telephone: (206) 728-6000
Telex: 32 8422
FAX: (206) 441-9090
Product line:
salmon (canned and frozen), herring, king crab, tanner crab, Dungeness crab, blackcod, halibut, bottomfish, salmon roe, kamaboko

Bill Saletic, *president*

"The Americans are interested in the abundant resources of bottomfish off the Pacific coast and Alaska. The capital necessary for processing will come from both domestic and foreign sources, but new marketing strategies will have to be developed to improve worldwide sales."

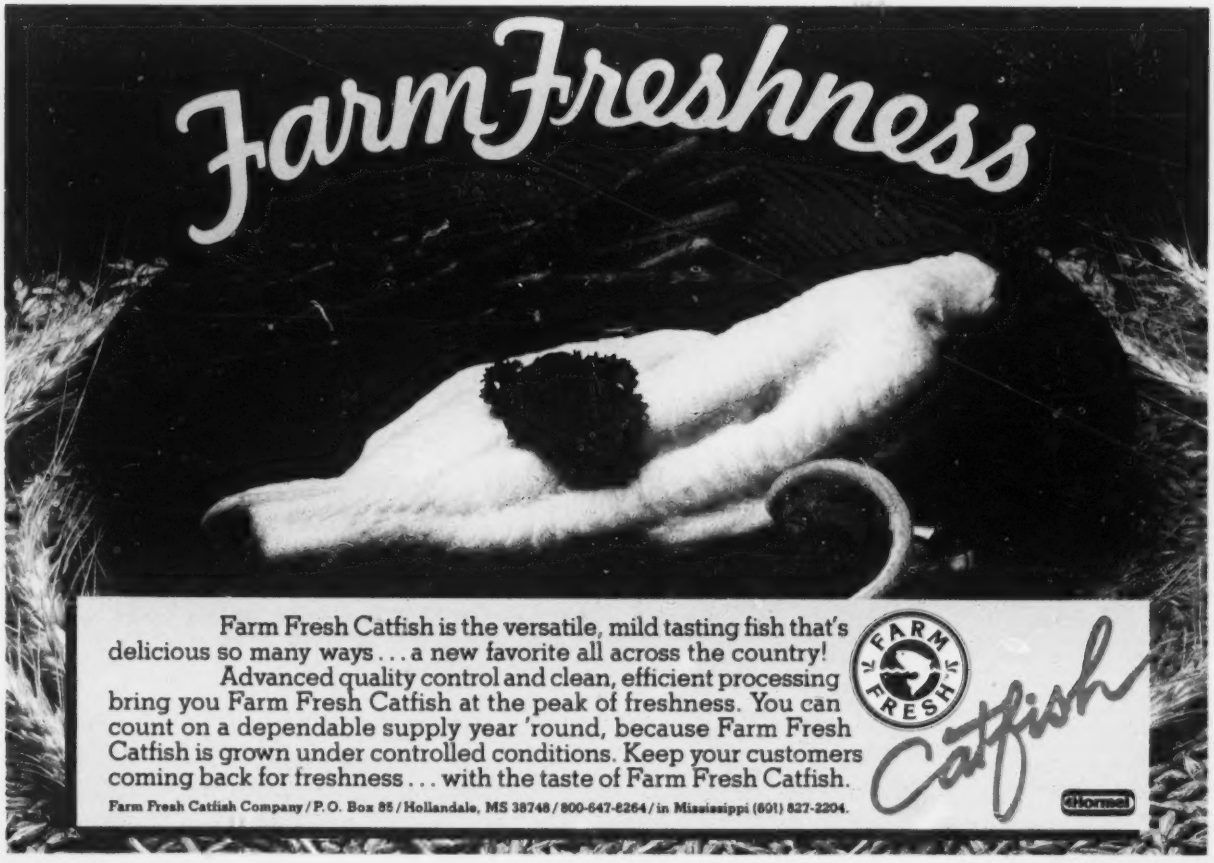
The company was founded in 1921 and built its strength on canned salmon. In 1978 the firm was purchased by Nichiro Gyogyo Kaisha, Ltd. of Tokyo and moved aggressively into the value-added market. The company operates three plants in Western Alaska and a floating processor. Subsidiaries include Astoria Warehouse, Seven Seas Fishing Company, Peninsula Salmon, and SeaBlends Food Company. Annual sales exceed $100 million.

Icicle Seafoods, Inc.
4019 21st Ave. W.
Seattle WA 98199
Telephone: (206) 282-0988
Telex: 880945
FAX: (206) 282-7222
Product line:
cod, crab (Dungeness, king and snow), halibut, herring, lingcod, octopus, perch, rockfish, sablefish, salmon (fresh and frozen), salmon roe, scallops, shrimp, surimi-based products

Robert F. Brophy, *president*

"Increasing demand for seafoods both at home and abroad provides limitless horizons for growth for all segments of the industry. For those active in the Alaska fisheries, the development through "Americanization" of the vast North Pacific bottomfish industry provides the greatest opportunities."

One of the fastest-growing companies in the industry, Icicle is the leading producer of canned salmon and a major supplier of salmon, halibut, sablefish, and crab. Under Brophy's aggressive marketing and sourcing strategies, Icicle has realized steady annual sales growth of 10 percent since 1980. The company employs 1,500 seasonal workers in seven processing facilities and its Seattle headquarters. Annual sales are $156 million.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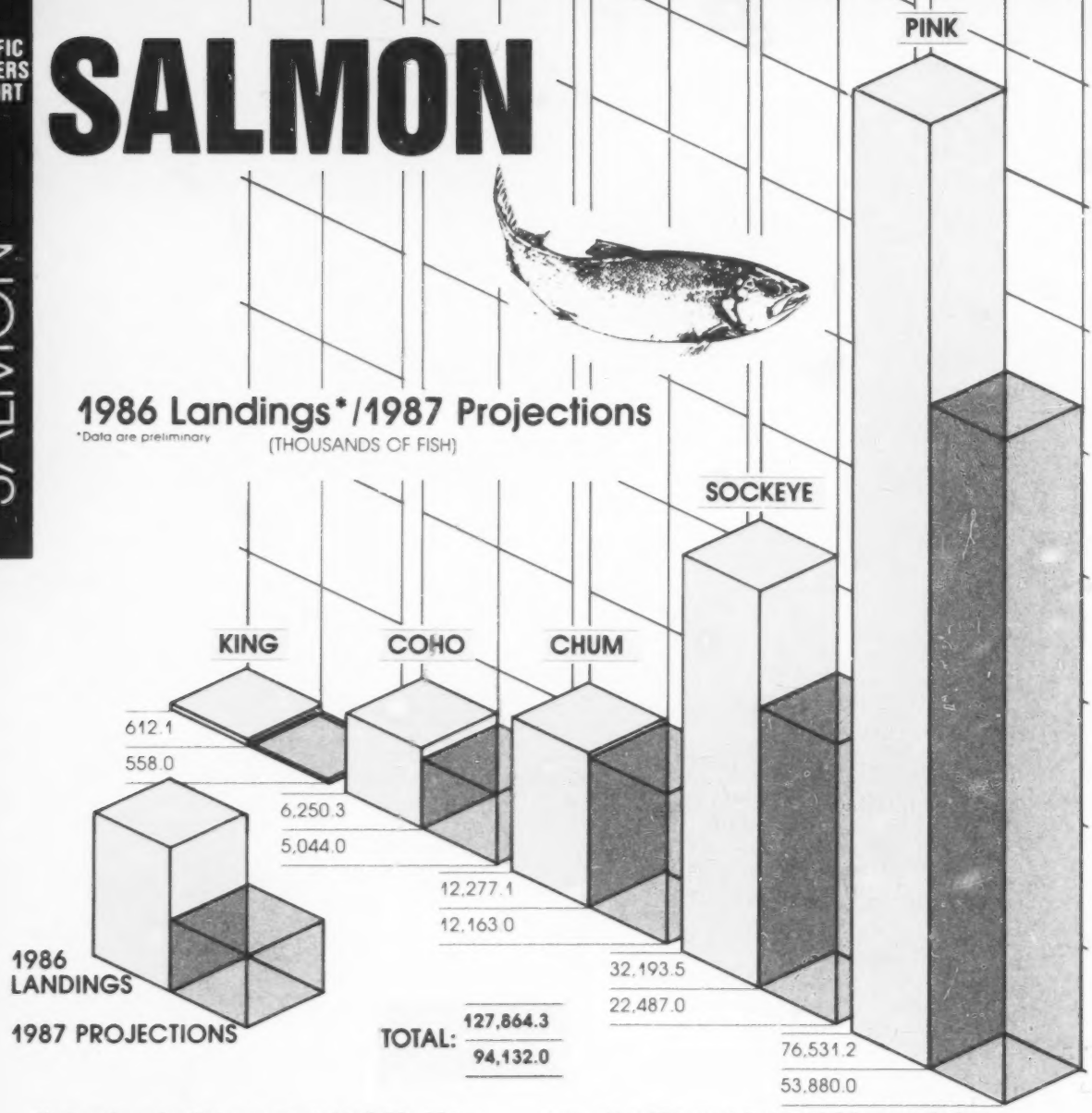
SALMON



Alaska salmon landings are expected to fall by 26 percent this year, with the biggest drops — 30 percent — in sockeyes and pinks. According to ADF&G projections, Bristol Bay will be the area hardest hit, with a 57 percent decline. Kodiak and Southeast Alaska packers should expect a 40 to 50 percent drop in pink harvests. Sockeye salmon from Chignik and the Copper River are expected in higher numbers this year — 50 percent above last year's catch in Chignik, and 20 percent above in the Copper.

Salmon production to determine prices

Alaska salmon landings were down in 1986 on all species except chum and coho, and wholesale prices reflected the shortage. Current unsold holdings of frozen and canned salmon are low going into a new season, but buyers do not expect a significant price increase over last year's wholesale levels.

This is due in part to an industry-wide feeling that Japanese buyers (who will take nearly all of Alaska's Bristol Bay catch) are more cautious this year than last, in terms of both volume and price. The Tokyo market for Bristol Bay sockeyes has been sluggish all winter, while Japanese product has moved, particularly lower-priced chum.

Wholesale prices in this country are likely to be determined by production rather than preseason inventories

(Continued on page 86)

1986 ALASKA CANNED SALMON PACK

(NUMBER OF 48-lb. CASES OR EQUIVALENT)

COMPANY	RED	PINK	CHUM	COHO	KING	TOTAL
Annette Island Packing Company[1]	328	184,593	4,520	797		190,238
Columbia-Wards Fisheries	26,760	204,522	9,492	3,636		244,410
Excursion Inlet Packing	130	173,086				173,216
Eyak Packing Co.	120		50	60	100	330
Farwest Fisheries	55,429	291,634	8,539	3,997	27	359,626
Icicle Seafoods	35,479	467,043	9,228	28,292	113	540,155
Nelbro Packing	72,132	95,000	1,535	163	200	169,030
Peter Pan Seafoods	60,449	80,100	56,019	7,066		203,634
Red Salmon Company	24,552	2,212	2,091	157	105	29,117
Sea-Alaska Products	41,923		3,282			45,205
South Naknek Seafoods	1,040	15				1,055
Wards Cove Packing Co.		152,594	135			152,729
TOTAL	318,342	1,650,799	94,891	44,168	545	2,108,745

1986 Fresh and Frozen Salmon and Salmon Roe

(NET: WHOLE POUNDS; TROLL: DRESSED POUNDS; ROE: FINISHED POUNDS)

COMPANY	NET CAUGHT SALMON Sold Frozen	NET CAUGHT SALMON Sold Fresh	TROLL CAUGHT SALMON Sold Frozen	TROLL CAUGHT SALMON Sold Fresh	TOTAL SALMON	SALMON ROE
ALASKA						
Annette Island Packing Co.	1,589,386		84,536		1,673,922	414,202
Arctic Alaska Seafoods	1,000,000				1,000,000	
Bristol Monarch Corp.	3,512,716				3,512,716	
Columbia-Wards Fisheries	15,684,865	337,515			16,022,380	544,904
Copper River Fishermen's Co-op.	2,971,368	147,702			3,119,070	142,208
Excursion Inlet Packing Co.	2,450,476		1,012,444		3,462,920	
Farwest Fisheries	690,291				690,291	663,407
Haines Packing Co.	2,877,093				2,877,093	
High Tide Seafoods	490,000	3,485,000			3,975,000	120,000
Icicle Seafoods	27,035,520	331,800	1,655,790	13,200	29,036,130	2,159,990
Int'l Seafoods of Alaska	6,572,500				6,572,500	200,000
Kemp Pacific Fisheries	13,760,485	407,380			14,167,865	347,741
Nakamura & Associates Inc.	483,000	70,000			553,000	28,500
Nelbro Packing Co.	610,100				610,100	379,728
North Coast Seafood	1,117,098				1,117,098	34,738
Northern Products Corporation	36,051		571,440		1,144,346[1]	6,268
Northern Seafoods Inc.						460,000
Peter Pan Seafoods	25,270,144	36,387			25,306,531	1,243,571
Red Salmon Company	2,364,217				2,364,217	
Sea-Alaska Products	8,962,324				8,962,324	97,327
Seafood Producers Co-op			5,428,130		5,428,130	15,200
Silver Lining Seafoods	800,000	896,000	100,000	150,000	1,946,000	60,000
Sitka Sound Seafoods, Inc.	2,023,507	18,993	4,879,226	257,974	7,179,700	210,000
South Naknek Seafoods	1,615,187				1,615,187	
UniSea	5,733,160	21,000			5,754,160	161,801
Ursin Seafoods, Inc.	1,628,246				1,628,246	
Wards Cove Packing Co.	1,279,000				1,279,000	
Western Alaska Fisheries	8,000,000				8,000,000	280,000
Whitney Foods	5,200,000	750,000			5,950,000	150,000
TOTAL ALASKA	143,756,734	6,501,777	13,731,566	421,174	164,937,926	7,719,585
CANADA						
Seaport Crown Fish Co.	70,000		200,000	100,000	370,000	
TOTAL CANADA	70,000		200,000	100,000	370,000	
WASHINGTON						
Arrowac Fisheries	2,350,000	150,000	50,000		2,550,000	81,500
Ebb Tide Processing	399,000[2]				399,000	8,000
Jessie's Ilwaco Fish Co.	1,500,000	1,000,000	250,000	500,000	3,250,000	100,000
TOTAL WASHINGTON	4,249,000	1,150,000	300,000	500,000	5,800,000	189,500
OREGON						
Bell Buoy Crab Company	9,974	3,325	6,438	2,145	21,882	1,200
TOTAL OREGON	9,974	3,325	6,438	2,145	21,882	1,200
CALIFORNIA						
General Fish Corp.			400,000	40,000	440,000	
Meredith Fish Co.			600,000	200,000	800,000	
TOTAL CALIFORNIA			1,000,000	240,000	1,240,000	

[1] includes 536,855 lbs. mild cure
[2] dressed weight
Source: *Seafood Business*

(Continued from page 82)

this year. The Alaska Department of Fish and Game recently upped its projections for the 1987 Bristol Bay catch from 7.1 million to 8.7 million salmon, a severe drop from last year's catch of 15 million.

Last year, wholesale prices for fresh salmon started out extremely high. (In May 1986, fresh H&G kings were selling for $5.99 per pound in Seattle.) Prices leveled out at high plateaus for both fresh and frozen, but product moved well. Expect more fresh and frozen salmon of Alaska origin in the domestic market this year, as distributors increase the profile of the domestic product and seek options to the export market.

Cold-storage holdings for salmon were 6 million pounds below last year's on January 31. Inventories of coho were 5.2 million (2.5 million below year-ago levels), and 3.8 million for sockeye. The largest drop in frozen salmon holdings is for pinks, down 5.5 million pounds to 1.5 million.

Chum salmon were landed in greater numbers in 1986 in both Alaska and Washington. Alaska fishermen netted 12 million chums, and Washington boats caught 12.7 million, exceeding 1985 landings by 1.5 million and 1 million respectively. Wholesale domestic prices reflected those high volumes by dropping 15 percent below January 1986 levels for H&G whole fish. With January 31 frozen inventories at 2.2 million pounds — the highest level since 1984 — prices are unlikely to increase in the next quarter.

Currency fluctuations played a major role in the market for both imports and exports. In 1986 the dollar continued its slide against the yen, franc, and krone. Much to the dismay of U.S. suppliers, customers in Europe were reluctant to buy salmon on a falling (currency) market in the first half of the year, and sales languished.

But once production began and the shorter supply became evident, European buyers started to deal. Still, much of 1986 was a buyer's market.

This situation worked against the Norwegian salmon farmers. The dollar held its own against the Norwegian krone for most of the year, allowing price levels to stay above the farmers' minimum. With the krone's significant strengthening in the first two months of 1987 (going from 7.49 krone to the

(Continued on page 88)

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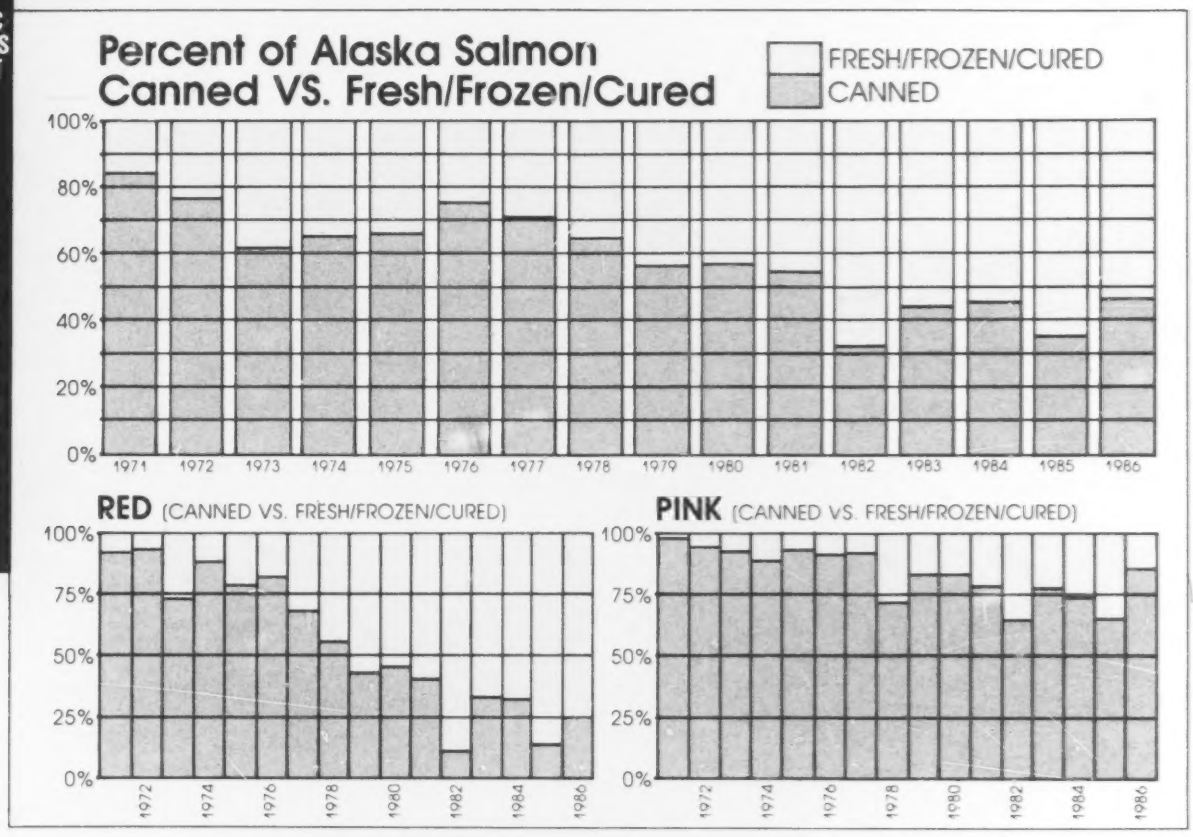

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Circle Reader Inquiry #52

(Continued from page 86)

dollar in December to 6.99 NK/$ in mid-February), Norwegian exporters were pushing wholesale prices up to the levels of prices on Scottish salmon.

If the dollar continues to fall, as many analysts predict it will, prices on Atlantic salmon may rise. Prices could remain level if there were a drastic imbalance between supply and demand, but Norwegian exporters don't anticipate that, despite higher production in 1987.

Small volumes of Chilean cohos, priced about 50 cents below Norwegian salmon, were imported in January and February of 1986. Chilean exporters predicted more volume would hit the U.S. market earlier this winter (beginning in December), but it didn't happen. Marketable volumes of Chilean cohos — available both head-on and head-off — were available this year in mid-January. Fresh Chilean imports should continue through March.

Canned-salmon prices edged up in 1986 for pinks, but went through the roof on reds and cohos. A 48-can case of red talls exceeded $200 on some sales, nearly double the case price of last spring. There were less than 325,000 cases of unsold reds at the

(Continued on page 90)

(Continued from page 88)

beginning of the year, down from 476,000 in January of 1986. Coho prices this spring are also nearly double what they were last year for the 48-tall case. But unsold inventories totaled 45,000 cases January 1, compared with 22,000 a year earlier. Case movement in January, for which figures were not available at press time, could show dramatic drops as a result of pre-Lenten sales. Most packers expect prices to rise quickly on all species after Lenten promotions and remain firm until new production hits the market.

A shortage of landed pink salmon meant a higher percentage went into the can in 1986, and still the case pack of 2.3 million (48-tall basis) was 200,000 below the 1985 pack. With an eye on dwindling pink landings, suppliers edged prices upward throughout the season, starting at about $72 (for 48 talls) and reaching $75 by midwinter. At that price, even during spring promotions, pinks were moving well. Post-Lenten prices could reach $83 to $85 for some branded packers. They are sure to rise somewhat, staying at higher levels until

(Continued on page 92)

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Circle Reader Inquiry #63

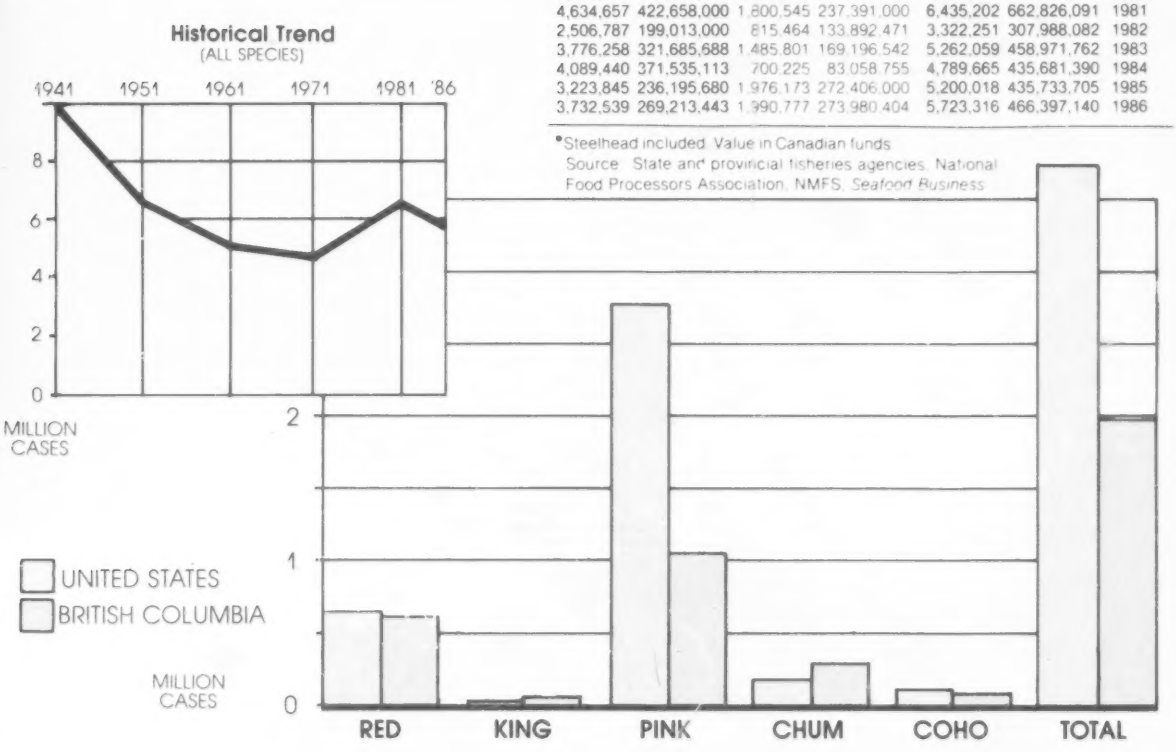
1986 U.S. and Canadian Pack

(48-LB. CASE EQUIVALENTS)

U.S. TOTAL		BRITISH COLUMBIA*		GRAND TOTAL		
Cases	Value ($)	Cases	Value ($)	Cases	Value ($)	YEAR
4,158,116	375,791,100	1,114,426	146,828,000	5,272,542	498,759,550	1980
4,634,657	422,658,000	1,800,545	237,391,000	6,435,202	662,826,091	1981
2,506,787	199,013,000	815,464	133,892,471	3,322,251	307,988,082	1982
3,776,258	321,685,688	1,485,801	169,196,542	5,262,059	458,971,762	1983
4,089,440	371,535,113	700,225	83,058,755	4,789,665	435,681,390	1984
3,223,845	236,195,680	1,976,173	272,406,000	5,200,018	435,733,705	1985
3,732,539	269,213,443	1,990,777	273,980,404	5,723,316	466,397,140	1986

*Steelhead included. Value in Canadian funds.

Source: State and provincial fisheries agencies, National Food Processors Association, NMFS, *Seafood Business*



(Continued from page 90)

early summer.

Peter Pan Seafoods has been issued a permit to market skinless, boneless pink salmon in the can this year. The company's production — 25,000 cases of 6½-ounce cans, 24 to a case — will be packed in the Petersburg Fisheries plant in Southeast Alaska and distributed at selected markets. That plant, owned by Icicle Seafoods, packed skinless, boneless, canned pinks last year for private labels. The new pink-salmon product is being produced by North Pacific Seafoods, packing for Hormel; Star Kist, packing under its own label; and Icicle Seafoods and Bumble Bee, both packing for private labels.

— Peggy Parker

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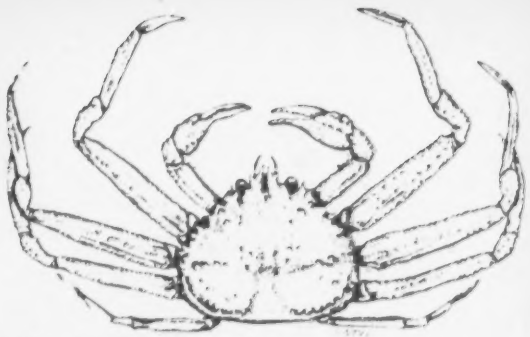
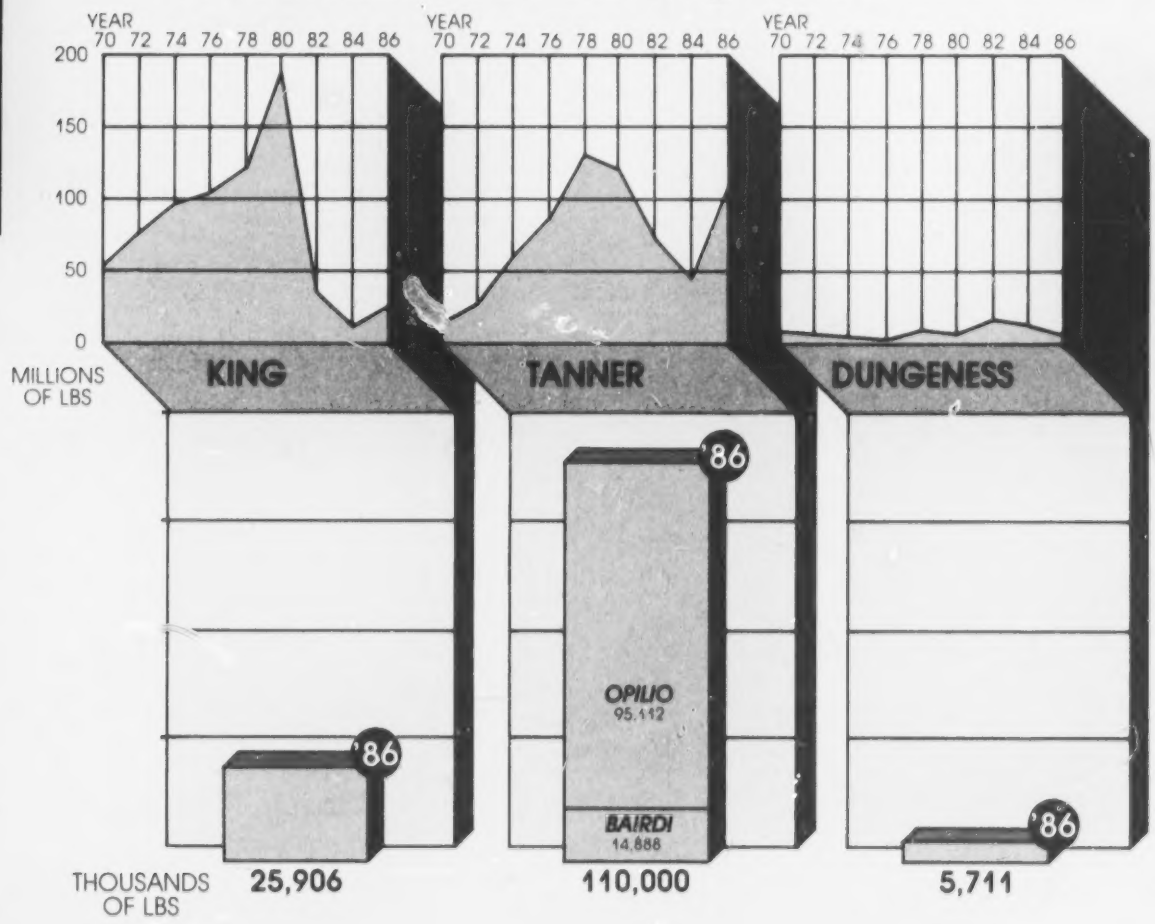
SHELLFISH



The 1986 king crab catch was up 69% over 1985, but far below the record high of 185.5 million lbs. in 1980. Opilio *made up the lion's share of tanner landings. The Dungeness crab catch in Alaska fell for the fourth year in a row.*

1986 Alaska Crab Landings

Note: 1986 dates are preliminary
Source: ADF&G



King crab: really on the upswing?

The king crab season in 1986 could have been headlined "The Great King Comeback." The catch of nearly 26 million pounds was just a fraction of the 1980 catch of 185 million pounds, but it offered a clear sign that stocks are rebounding from the 1981 crash.

Between 1981 and 1983, landings dropped 46 percent per year, reaching a low of 15 million pounds in 1985.

Imports of surimi-based imitation crab legs inundated the market during that period, and while few users of king crab substituted a surimi product for the real thing, the abundance of analogs underscored the scarcity of real crab. Restaurateurs began looking for permanent replacements for king crab on the menu.

During the past 18 months, the Alaska Seafood Marketing Institute has energetically promoted Alaska's crab supplies, which include *opilio* snow crab, a shellfish abundantly available. These efforts have paid off — domestic sales are brisk, and wholesale prices are firm at high levels.

The return of king crab is exciting news, but the real story in crab is the fast pace of the *opilio* market. More than 95 million pounds were landed in 1986 (nearly double the projection). In

1986 West Coast Frozen Shellfish

(WHOLE POUNDS, IN SHELL)

COMPANY	KING CRAB	TANNER CRAB *BAIRDI*	TANNER CRAB *OPILIO*	DUNGENESS CRAB	SHRIMP	SCALLOPS	CLAMS	OYSTERS	TOTAL
ALASKA									
Arctic Alaska Seafoods	800,000	400,000	5,000,000						6,200,000
Icicle Seafoods	747,000	918,650		1,205,640	1,004,360				3,875,650
Int'l Seafoods of Alaska	172,000								172,000
New Wave Seafoods						7,070			7,070
Peter Pan Seafoods	436,708	1,049,649	1,202,468	16,719					2,705,544
Sans Souci Seafoods	68,992	38,928	272,976	4,000					390,490[1]
Sea-Alaska Products	2,826,510	25,650	12,079,482			39,588			14,971,230
Silver Lining Seafoods	20,000			35,000	84,000		125,000		264,000
Sitka Sound Seafoods	7,412	385,335		538,009					930,756
UniSea	990,353	1,300,705	8,147,059						10,438,117
Ursin Seafoods	898,854	1,516,739	476,327			5,573			2,897,493
Western Alaska Fisheries	150,000	1,320,000	170,000	40,000		35,000			1,715,000
TOTAL ALASKA	6,945,829	7,127,656	27,348,312	1,839,368	1,088,360	87,231	125,000		44,567,350
CANADA									
Seaport Crown Fish Co., Ltd.		10,000		5,200	400,000	110,000	300,000	350,000	1,175,200
TOTAL CANADA		10,000		5,200	400,000	110,000	300,000	350,000	1,175,200
WASHINGTON									
Jessie's Ilwaco Fish Co.				500,000	3,300,000	50,000			3,850,000
Rock Point Oyster Company							82,000	85,648	167,648
TOTAL WASHINGTON				500,000	3,300,000	50,000	82,000	85,648	4,017,648
OREGON									
Bell Buoy Crab Company				70,000			46,627		116,627
TOTAL OREGON				70,000			46,627		116,627
CALIFORNIA									
Intertidal Aquafarms								29,000	29,500[2]
Meredith Fish Company				500,000	200,000				900,000[3]
Seafood Specialties					181,527				271,985[4]
TOTAL CALIFORNIA				500,000	381,527			29,000	1,201,485

[1] includes 5,594 lbs. Korean hair crab. [2] includes 500 lbs. cultured bay mussels. [3] includes 100,000 lbs. freshwater crawfish, 100,000 lbs. sea urchins.
[4] includes 32,287 lbs. lobster, 58,171 lbs. abalone.
Source: *Seafood Business*

late January, less than 5 million pounds (of sections) were held in cold storage. Prices on bulk *opilio* were steady, but the growing popularity of "snap and eats" took prices to $2.50 to $2.60 in mid-February. Many processors are shipping bulk product to Korea for scoring of claw and leg sections before putting the crab on the U.S. market. Supplies of bulk *opilio* in this country were scarce this winter, but market demand is clearly for the value-added product, either split legs or "snap and eats."

The Alaska Department of Fish and Game projects a harvest of 56.4 million *opilio* this year, but the actual catch is likely to exceed that. How much higher it will be is difficult to predict. Many suppliers, betting that the ADF&G prediction is on target, expect further increases in wholesale prices this year. Through mid-February, 12.1 million pounds of *opilio* had been delivered by Alaska fishermen. Weekly catches were topping 5 million pounds during that peak period.

Red king landings in Bristol Bay last fall were more than 10 million pounds, about two and a half times the 1985 landings. Ex-vessel prices were in the stratosphere at $4.05 a pound FOB Dutch Harbor, keeping January wholesale prices above $8 for 16/20s in Seattle. By late February, however, 16/20s and 14/16s were scarce, and prices had crept up to $8.30 and $8.75 respectively.

Brown or golden kings are still being caught in Alaska and should provide a good value throughout 1987, as the ex-vessel price in Dutch Harbor is $2.90. That puts the wholesale price about $1 a pound below the price of red kings. Because of the scarcity of reds, however, a lot of golden king crab was selling at $8 to $8.20 this winter. In the western Aleutians,

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Circle Reader Inquiry #53

1986 Alaska Shellfish Landings by Area

(THOUSANDS OF POUNDS)

AREA	KING CRAB	DUNGENESS CRAB	TANNER CRAB *opilio*	TANNER CRAB *bairdi*	TRAWL SHRIMP	POT SHRIMP	SCALLOPS	CLAMS	OTHERS
Southeast	793	3,070		1,000	2,541		76	130	220.0[1]
Prince William Sound	51	1,050		553	214	234		13	6[2]
Cook Inlet		551		164	1,202	41	15	273	4[2]
Kodiak	151	849		8,975	455	3	154	2	12.0[1]
Chignik		60		185					
South Peninsula		120		3,764					
Dutch Harbor	1,850	11		167			400		
Adak/Western Aleutians	10,570			80					
Bering Sea	1,184		95,112						15.7[3]
Norton Sound	479								
Bristol Bay	10,828								
TOTAL	25,906	5,711	95,112	14,888	4,412	278	645	418	248.7

[1]primarily sea urchins [2]octopus [3]primarily hair crab
Note: 1986 data are preliminary
Source: ADF&G

golden king crab catches through mid-February totaled 4.1 million pounds. The season remains open until August 1, and landings are expected to be on a par with last year's — about 11 million pounds.

Competition between Alaskan and Soviet king crab became a nonissue last year, as prices closed to within 10 or 15 cents a pound. Just under 2 million pounds of the Russian product were brought into the U.S. last year. Imports this year are likely to be about 1.5 million pounds. The Russian product is blast-frozen, the Alaskan product brine-frozen, but that difference meant little to buyers last year and should mean little this year.

Alaskan *bairdi* stocks are dropping. Last year's catch of 14.8 million pounds was only two-thirds of the 1985 catch, and projections for this season are lower yet. In Kodiak, where *bairdi* fishing closed February 28, landings were below 5 million pounds (compared with 9 million last year). It's unlikely the state's entire catch will exceed 8 million this year.

Bairdi was a good value in the U.S. market last year, with wholesale prices in the area of $4 a pound. Prices for new-season product, however, started high, moved up, and stayed high throughout January and February. The ex-vessel price for *bairdi* moved from $2 to $2.60 over the course of the season, pushing the wholesale price for clusters to $5.25 in February. But many suppliers described the market as "in limbo" last year, and the situation for *bairdi* has not improved.

Cold-storage holdings for *bairdi* and *opilio* on January 31 were 2.8 million pounds of meat, 2 million pounds higher than in January 1986. There were nearly 5 million pounds of sections in the freezer, about what there was a year ago.

Landings of Dungeness crab were dismal in Alaska and British Columbia

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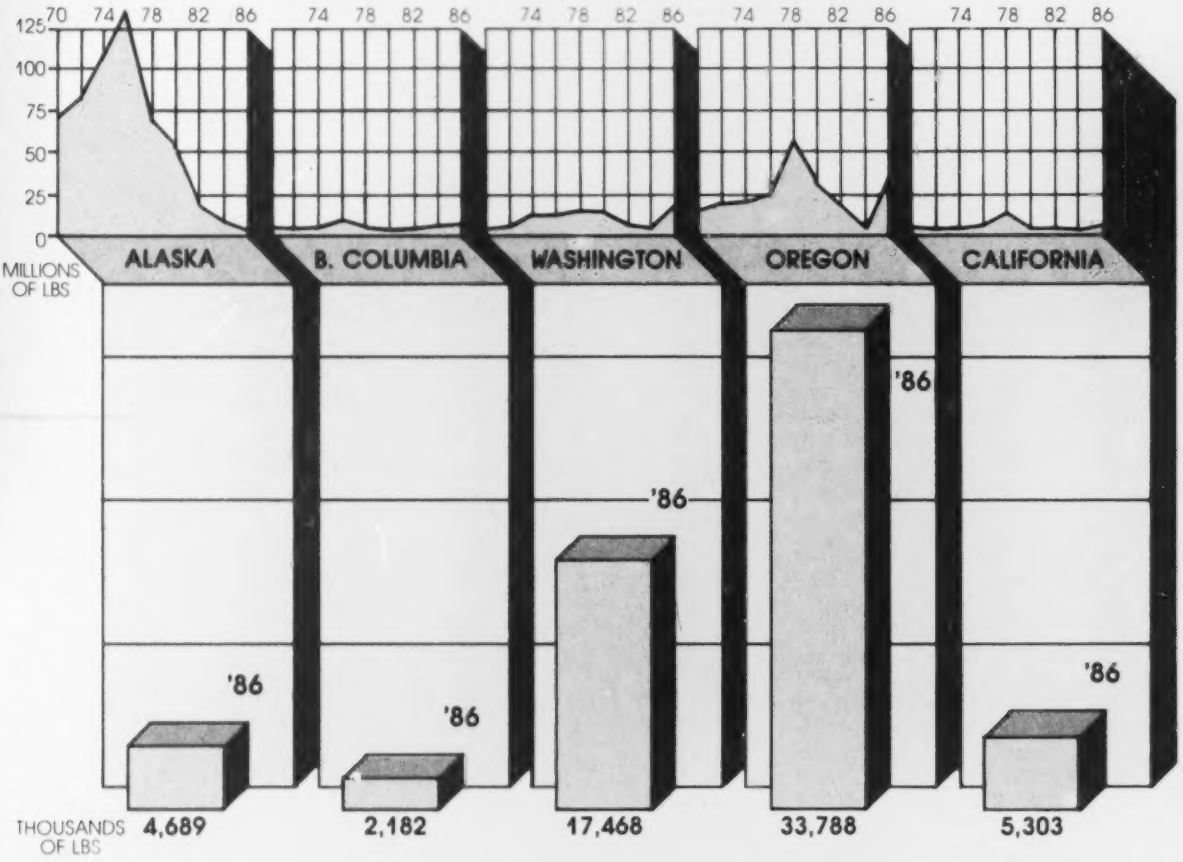
Circle Reader Inquiry #28

Pacific Coast Shrimp Landings

Note: 1986 data are preliminary.
Sources: State and provincial fisheries agencies

Last year's healthy landings of P. jordani *in Washington and Oregon show that stocks could be returning to the volumes seen in the late '70s. Catches continue to decline in Alaska and British Columbia.*



in 1986, but picked up dramatically in Oregon and slightly in both Washington and California.

Alaska landings continued their drop from a 1982 record high of 15.9 million, totaling only 5.7 million last year. Oregon topped its 1985 landings of 4.9 million, bringing in 7.2 million during the 1985–86 season. Washington and California landings were 5.3 and 5.7 million respectively, a few hundred thousand pounds more than a year ago.

Current landings in Oregon and Washington have dropped since the season began in December, and some suppliers say total landings will fall short of the 1985–86 season. Wholesale prices for whole cooked product, however, remain steady at $2.25 to $2.50. Prices for this product are tied directly to ex-vessel prices, which were firm at $1.75 for most of January and February.

Cold-storage holdings of Dungeness crab were near record lows in late January. Only 1.5 million pounds (mostly of whole cooked) were in the freezer, compared with 3.1 million one year earlier. Combined with dwindling catches, the low holdings will likely drive up wholesale meat prices from late-February levels of $9 to $9.50. Packers do not expect the price to go beyond $9.75, however.

— Peggy Parker

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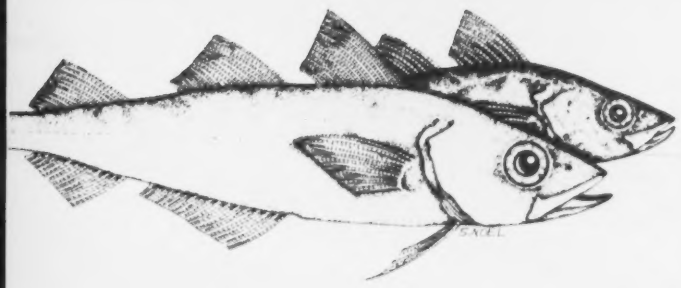
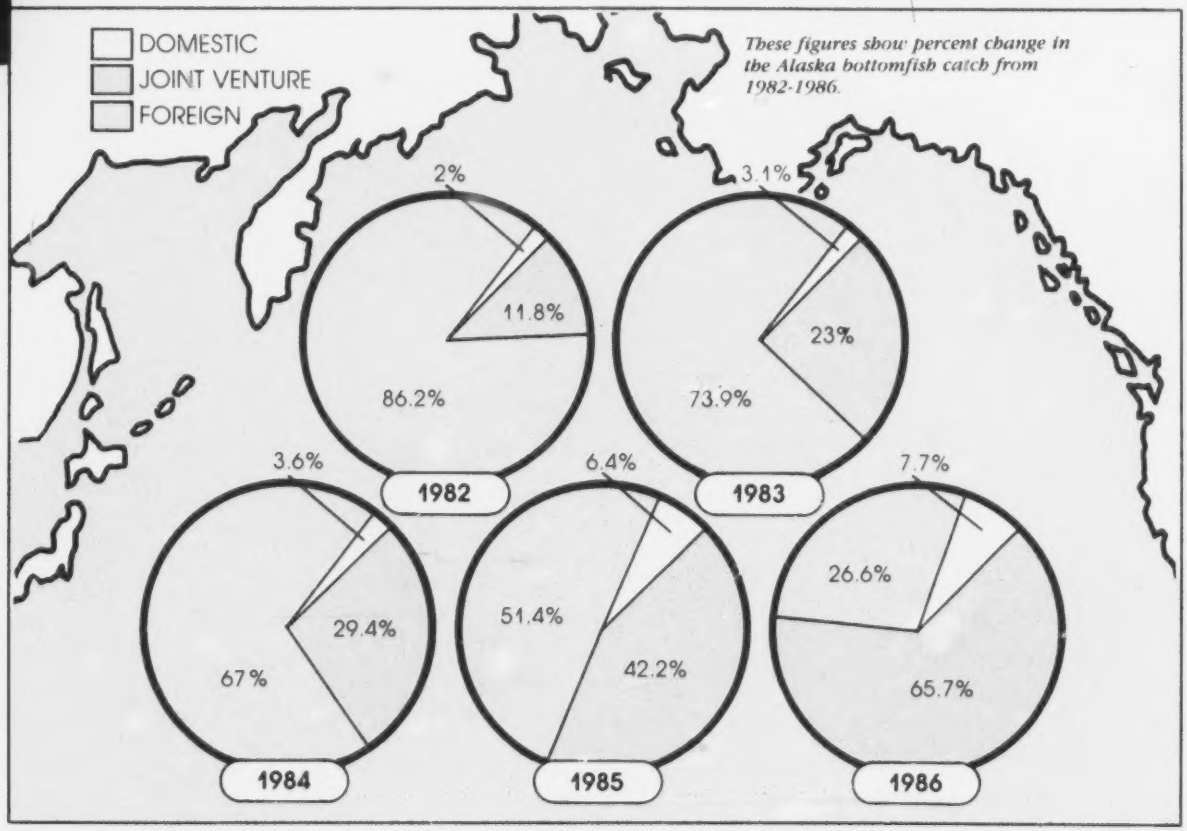
Circle Reader Inquiry #9

BOTTOMFISH



"Americanization" has become a reality in the North Pacific, where American vessels will take the majority of the allocated stocks this year. Ninety-four percent of the groundfish in the Gulf of Alaska will be taken by U.S. fishermen, whose major foreign customer is Japan (77 percent of the foreign allocation), followed by Korea (22 percent) and China (1 percent).



Groundfish supplies and prices both up

Alaska draggers and long-liners are in the enviable position of having groundfish supply and demand increase at the same time. Not only are they catching more pollock, halibut, and blackcod than before, but they're getting better prices for it.

North Pacific groundfish harvests are almost completely Americanized, and processing capacity is catching up. Foreign fishing will account for only six percent of the 1987 catch, as foreign vessels have been banned entirely from the Gulf of Alaska and allowed only small quantities of cod, flatfish, turbot, and sole in the Bering Sea and Aleutians.

Joint-venture quotas will actually decrease for the first time since over-the-side sales were made in the late 1970s. Domestic processors and factory ships will catch and/or purchase all the cod and most of the pollock in the gulf. Squeezed between rising do-

mestic capacity and declining stocks, joint-venture buyers have been allocated only 20,000 metric tons of gulf pollock in a special exploratory "outside Shelikof" fishery. (Total gulf catches are down to just 100,000 mt.)

Aleutian shoreside plants are having trouble getting enough pollock deliveries to feed their surimi lines, since skippers prefer to deliver at sea. So processors are pushing for a 100-mile "domestic priority access zone" around Dutch Harbor. Surimi plants are operating in Dutch Harbor and Akutan, and a U.S. company has actually exported a small shipment of surimi to Japan. At least two factory trawlers for surimi were under construction in early 1987, and several existing vessels were switching over from fillets.

Fillets profitable now

Rising fillet prices have helped to boost domestic investment in at-sea processing. "Doing fillets is profitable now," says Ted Evans of the Alaska Factory Trawler Association. Pollock prices have doubled, with shatterpack and IQF going for $1.45 to $1.80 in February, compared with 70 to 80 cents in the summer of 1985. Pollock blocks are selling for $1.05 to $1.20 a pound, compared with the longtime benchmark of 65 cents a pound. Cod prices are up about a dollar, running $2.30 to $2.70 for shatterpack, depending on fillet size.

At least four factors are contributing to the favorable market for Alaskan cod and pollock.

First, cod supplies are tight. Groundfish are in very short supply in Canada, Iceland, the Barents and Baltic seas — all around the world. Year-end inventories of cod fillets were half what they were in 1985.

"We've had sales to former Iceland customers," says Bill Stokes of Glacier Fish Company, which operates factory trawlers in Alaska. "They [Iceland] just didn't have the product to supply them." Shortages have also forced buyers to consider pollock as a serious whitefish alternative, with the result that both the reputation and the price of that species have gone up.

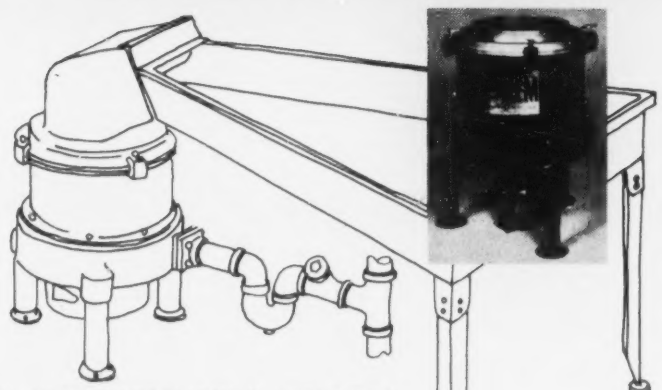
Second, the Korean fleet is switching over from blocks to surimi production, adding to the worldwide shortage of fillets.

Third, Americans are eating more fish than they used to, and many of them are purchasing whitefish, a familiar, easily prepared product.

Finally, the cost of raw material is rising. Ex-vessel pollock prices jumped by at least a third at the beginning of 1987, to $95 to $127 per ton for joint-

(Continued on page 105)

FROM CATCHING TO DISPOSING



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Circle Reader Inquiry #5

Pacific Bottomfish Landings

(THOUSANDS OF POUNDS)

	WASHINGTON[1]			OREGON			CALIFORNIA			BRITISH COLUMBIA		
	1984	1985	1986	1984	1985	1986	1984	1985	1986	1984	1985	1986
Cod, Pacific	35,121	16,234	11,141	176	85	73	4	2		7,610	5,160	7,729
Dogfish	7,620	5,533	5,144	1	t	1			22	2,167	5,896	5,588
Flounder, arrowtooth	4,280	4,317	4,028	919	1,539	1,108	71	83	26	372[1]	145[1]	112[1]
Flounder, starry	684	813	612	237	790	212	469	380	191			
Groundfish, other	828			1,126	929	854	353	324	3,769			
Halibut	5,571	5,700	6,420	1,055	813	1,314				6,842	10,348[2]	9,111
Lingcod	4,738	5,652	3,143	2,345	2,321	1,433	2,095	1,493	739	8,155	12,514	8,053
Pacific Ocean perch	3,806	4,124	3,900	1,577	1,555	1,378	91	144	35	15,853	13,932	12,442
Pollock	9,068	6,635	2,055	1	1	2			22	1,311	3,717	669
Rockfish, other	12,257	17,440[4]	29,551[4]	15,490	17,759	15,076	37,060	30,788	28,072	16,476	25,259	36,924
Rockfish, widow	3,688			11,636	9,536	9,561	6,131	6,669	5,001			
Sablefish	10,491	9,300	5,980	10,666	11,642	10,227	10,632	11,244	10,771	8,474	9,380	10,121
Sole, Dover	7,481	6,331	3,456	13,473	12,585	10,526	21,547	25,626	18,434	2,495	2,097	2,460
Sole, English/lemon	2,503	2,247	1,879	993	1,031	1,219	2,098	2,228	1,635	1,764	1,498	929
Sole, petrale/brill	1,076	949	812	1,518	1,274	1,524	1,302	1,693	1,118	887	732	862
Sole, rex	356	287	177	1,210	874	627	1,253	1,867	1,329	497	445	189
Sole, rock	184	229	356	5	1	13	12	19	4	1,109	930	917
Whiting	14,440	20,893	18,391	746	1,950	926	5,148	6,605	6,490		13,203	13,617
Skate		155	221	60	11	23				858	814	1,093

t = less than 500 lbs [1] All flounder [2] Head-off weight [3] Includes Canadian catch landed in U.S. ports [4] All rockfish

Source: State and provincial fisheries agencies
Note: 1986 figures are preliminary

Alaska Bottomfish Catch

(METRIC TONS)

		GULF OF ALASKA			BERING SEA/ALEUTIANS			TOTAL ALASKA		
		1985	1986	% Change	1985	1986	% Change	1985	1986	% Change
Pollock	Joint Ventures	237,860	58,844	-75.3	377,540	840,420	122.6	615,400	899,264	46.1
	*Domestic Processors	22,013	10,088	-54.2	39,667	48,140	21.4	61,680	58,228	-5.6
	Foreign Catch	31,616	114	-99.6	821,272	356,013	-56.7	852,888	356,127	-58.2
	Total	291,489	69,046	-73.6	1,238,479	1,244,573	5	1,529,968	1,313,619	-14.1
Sablefish	Joint Ventures	226	44	-80.5	110	433	293.6	336	477	42.0
	*Domestic Processors	11,623	20,671	77.8	3,915	5,786	47.8	15,538	26,457	70.3
	Foreign Catch	39	1	-97.4	313	112	-64.2	352	113	-67.9
	Total	11,888	20,716	74.3	4,338	6,331	45.9	16,226	27,047	66.7
Pacific Cod	Joint Ventures	2,266	1,251	-44.8	41,272	64,596	56.5	43,538	65,847	51.2
	Domestic Processors	3,090	5,279	70.8	46,822	37,010	-20.9	49,912	42,289	-15.3
	Foreign Catch	9,086	15,194	67.2	57,331	40,642	-29.1	66,417	55,836	-15.9
	Total	14,442	21,724	50.4	145,425	142,248	-2.2	159,867	163,972	2.6
Flatfish	Joint Ventures	2,447	904	-63.0	172,746	218,270	26.4	175,193	219,174	25.1
	Domestic Processors	752	1,143	52.0	62	7,409	11,850.0	814	8,552	950.6
	Foreign Catch	170	71	-58.2	148,052	78,402	-47.0	148,222	78,473	-47.0
	Total	3,369	2,118	-37.1	320,860	304,081	-5.2	324,229	306,199	-5.6
Pacific Ocean Perch	Joint Ventures	254	0	-100.0	446	274	-38.6	700	274	-60.9
	Domestic Processors	863	2,820	226.8	818	894	9.3	1,681	3,714	120.9
	Foreign Catch	8	0	-100.0	74	18	-75.7	82	18	-78.0
	Total	1,125	2,820	150.7	1,338	1,186	-11.4	2,463	4,006	62.6
Rockfish	Joint Ventures	53	0	-100.0	17	276	1,523.5	70	276	94.3
	Domestic Processors	2,037	3,698	81.5	169	235	39.1	2,206	3,933	78.3
	Foreign Catch	6	0	-100.0	44	18	-59.1	50	18	-64.0
	Total	2,096	3,698	76.4	230	529	130.0	2,326	4,227	81.7
Atka Mackerel	Joint Ventures	1,846	5	-99.7	37,858	31,984	-15.5	39,704	31,989	-19.4
	Domestic Processors	0	0	0.0	0	5	—	0	5	—
	Foreign Catch	2	0	-100.0	1	2	100.0	3	2	-33.3
	Total	1,848	5	-99.7	37,859	31,991	-15.5	39,707	31,996	-19.4
Other	Joint Ventures	2,253	316	-86.0	6,374	7,624	19.6	8,627	7,940	-8.0
	Domestic Processors	485	373	-23.1	926	415	-55.2	1,411	788	-44.2
	Foreign Catch	102	149	46.1	7,897	5,022	-36.4	7,999	5,171	-35.4
	Total	2,840	838	-70.5	15,197	13,061	-14.1	18,037	13,899	-22.9
Total	Joint Ventures	247,205	61,364	-75.2	636,363	1,163,877	82.9	883,568	1,225,241	38.7
	Domestic Processors	40,863	44,072	7.9	92,379	99,894	8.1	133,242	143,966	8.0
	Foreign Catch	41,029	15,529	-62.2	1,034,984	480,229	-53.6	1,076,013	495,758	-53.9
	Total	329,097	120,965	-63.2	1,763,726	1,744,000	-1.1	2,092,823	1,864,965	-10.9

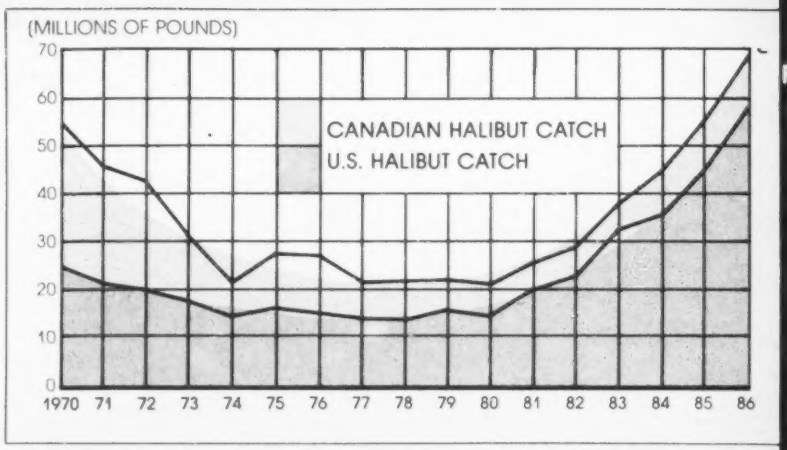
Note: 1986 data are preliminary
Source: National Marine Fisheries Service
*through Oct. 31 only

Pacific Halibut Catch

(THOUSANDS OF POUNDS)

YEAR	U.S.	CANADA	TOTAL
1970	25,783	29,155	54,936
1971	21,158	25,496	46,654
1972	20,483	22,535	43,018
1973	17,290	14,410	31,700
1974	13,938	7,368	21,306
1975	16,259	11,357	27,616
1976	15,539	11,996	27,535
1977	13,101	8,767	21,868
1978	13,383	8,605	21,988
1979	15,868	6,659	22,527
1980	14,264	7,602	21,866
1981	20,078	5,654	25,732
1982	23,470	5,538	29,008
1983	32,948	5,436	38,384
1984	35,916	9,054	44,970
1985	45,739	10,172	55,911
1986	58,338	11,249	69,587

Note: 1986 data are preliminary.
Source: International Pacific Halibut Commission



(Continued from page 101)

venture deliveries. Kodiak shore-based deliveries are reportedly $176 per ton.

Contagious increases

These increases have been contagious, affecting everything that swims on or near the bottom. Long-liners didn't want to take the entire quota offered them by the International Pacific Halibut Commission biologists, for fear of overloading the market, but they still hooked some 68.8 million pounds in 1986, a 25 percent increase over the 1985 catch and double what fishermen were allowed in the 1970s and early 1980s. Nevertheless, ex-vessel prices still floated back to 1983 levels, opening at 90 cents and quickly moving to $1.20 in Alaska. Fresh prices in Seattle reportedly topped out at $2. Wholesale prices for frozen fish opened at about $1.75 and eventually worked their way up to $2.40 to $2.50.

Alaskan long-liners are enjoying increases in blackcod quotas, which have recovered from a slump in the 1970s. This once sleepy fishery achieved its quota before the end of the year (for only the second time in history), due in part to an influx of Alaskan boats that made some coastal sets between Seattle deliveries and Alaskan openings.

Coastal draggers are also doing well, despite reduced snapper (Pacific rockfish) quotas. The Fishermen's Marketing Association of Eureka negotiated ex-vessel price increases of a few cents a pound on rockfish and widow rock, Dover and large petrale sole. Trawlers are getting near longline prices for blackcod at 91 cents for large dressed fish (compared

(Continued on page 106)

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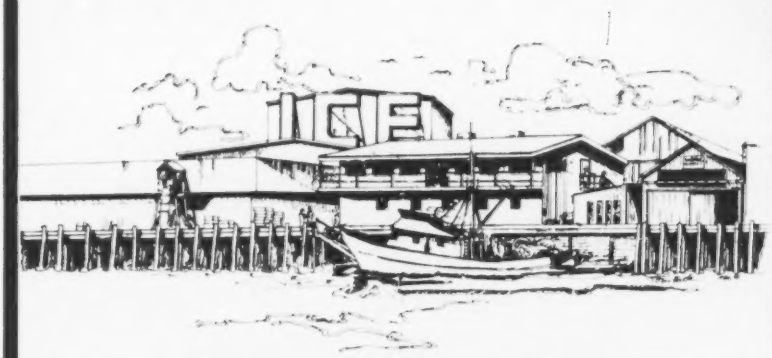

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Circle Reader Inquiry #10

1986 West Coast Frozen Food Fish

(POUNDS)

COMPANY	HALIBUT	BLACK COD	PACIFIC COD	POLLOCK	ROCKFISH	FLATFISH	ROE HERRING	TOTAL
Annette Island Packing Co.	189,582	98,342			18,746		903,034	1,212,411[1]
Arctic Alaska Seafoods		6,000,000	50,000,000	24,000,000	6,000,000	8,000,000		99,000,000[2]
Bristol Monarch Corp.							4,204,860	4,204,860
Columbia-Wards Fisheries	598,432	8,955					111,250	718,637
Copper River Fishermen's Co-op	269,174	88,107						357,281
Excursion Inlet Packing Co.	769,342							799,406[3]
Icicle Seafoods	10,025,820	5,209,790	35,990		64,680		18,371,780	33,711,060
Int'l Seafoods of Alaska	1,511,000	133,000	2,800,000	4,112,000	18,000	575,000		9,149,000
Kemp Pacific Fisheries	10						6,142,000	6,152,000
New Wave Seafoods	708		52		100			860
North Coast Seafood Processors							304,099	495,198[3]
Northern Products Corp.	619,469	140,371						759,840
Peter Pan Seafoods	442,821	413,852					913,540	1,770,213
Seafood Producers Co-op.	551,230	1,143,670			27,106		950,798	2,672,804
Silver Lining Seafoods	302,000	493,000			1,022,000			1,817,000
Sitka Sound Seafoods	2,914,000	4,115,400			732,700		955,600	8,717,700
UniSea		3,823,730	1,096,865	33,482,440			2,128,720	40,531,755
Ursin Seafoods	1,781,476	154,876						1,936,352
Virgin Bay Kelp Co.								132,000[4]
Western Alaska Fisheries	2,030,000	650,000	850,000	20,000	2,000	5,000	1,000,000	4,557,000
TOTAL ALASKA	22,005,064	22,473,093	54,782,855	61,614,440	7,885,332	8,580,000	35,988,681	219,810,777
CANADA								
Seaport Crown Fish Co., Ltd.	80,000	15,000	200,000	20,000	100,000			415,000
TOTAL CANADA	80,000	15,000	200,000	20,000	100,000			415,000
WASHINGTON								
Arrowac Fisheries	282,000	381,000			50,000			7,713,000[5]
Jessie's Ilwaco Fish Co.		1,000,000	100,000		3,000,000	2,000,000		12,600,000[6]
TOTAL WASHINGTON	282,000	1,381,000	100,000		3,050,000	2,000,000		20,313,000
OREGON								
Bell Buoy Crab Company	4,200							4,200
TOTAL OREGON	4,200							4,200
CALIFORNIA								
General Fish Corp.	20,000	20,000			800,000	500,000		1,340,000
Meredith Fish Co.		200,000						200,000
Seafood Specialties	96,210				390,827	42,268		1,192,897[7]
TOTAL CALIFORNIA	116,210	220,000			1,190,827	542,268		2,732,897

[1] includes 2,707 lbs. lingcod [2] includes 30,064 lbs. lingcod [3] includes 191,099 lbs. roe kelp [4] includes 48,000 lbs. roe kelp (wild); 84,000 lbs. roe kelp (pounded)
[5] includes 2,750,000 lbs. pacific whiting; 4,250,000 lbs. of pacific dogfish [6] includes 1,500,000 lbs. smelts; 3,000,000 lbs. tuna; 2,000,000 lbs. other fish
[7] includes 553,881 lbs. angel shark; 27,115 lbs. thresher shark; 66,198 lbs. swordfish; 16,388 lbs. sea bass [8] includes 5,000,000 lbs. surimi
Source: *Seafood Business*

with 65 cents a year ago) and are beginning to sell to the Japanese, once an exclusively longline market.

Fishermen and processors aren't sure how long these prices will last. The catch compression caused by derby openings gives Japanese buyers more leverage over blackcod prices. And, although it's too early to tell how serious the problem might be, consumers are showing some resistance to rising prices at the retail level. Halibut, for example, retailed for $4.98 in 1986, compared with $2.98 the year before.

"It does slow down movement," said one buyer for a national chain. "Most of our popular fillets, the ones we're used to, are in short supply and high in price . . . . We're looking for alternatives." Retailers have yet to

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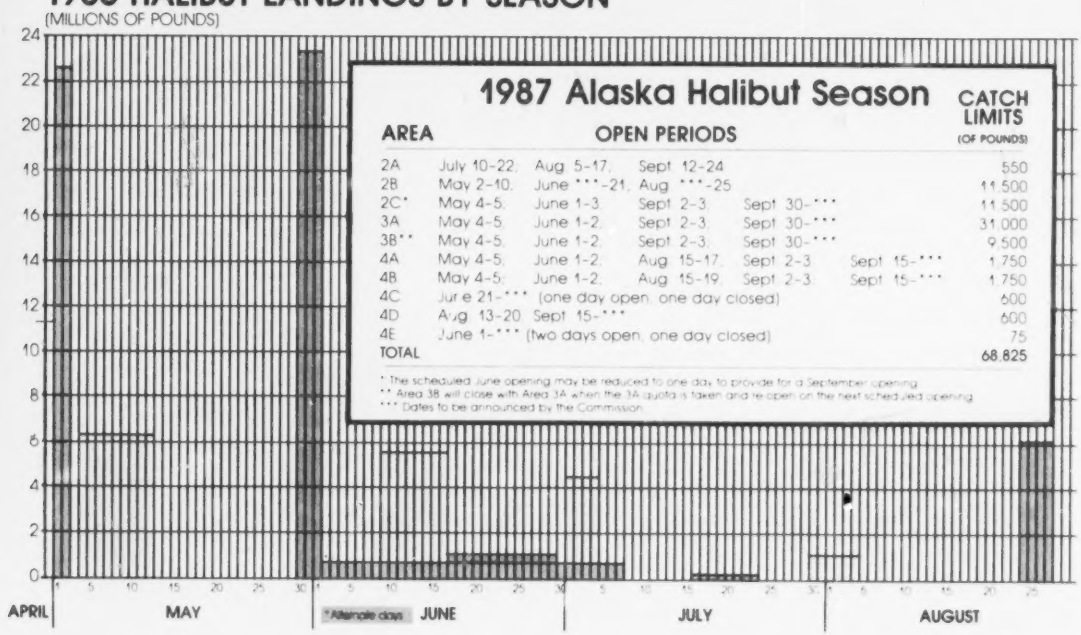
1986 HALIBUT LANDINGS BY SEASON



1987 Alaska Halibut Season

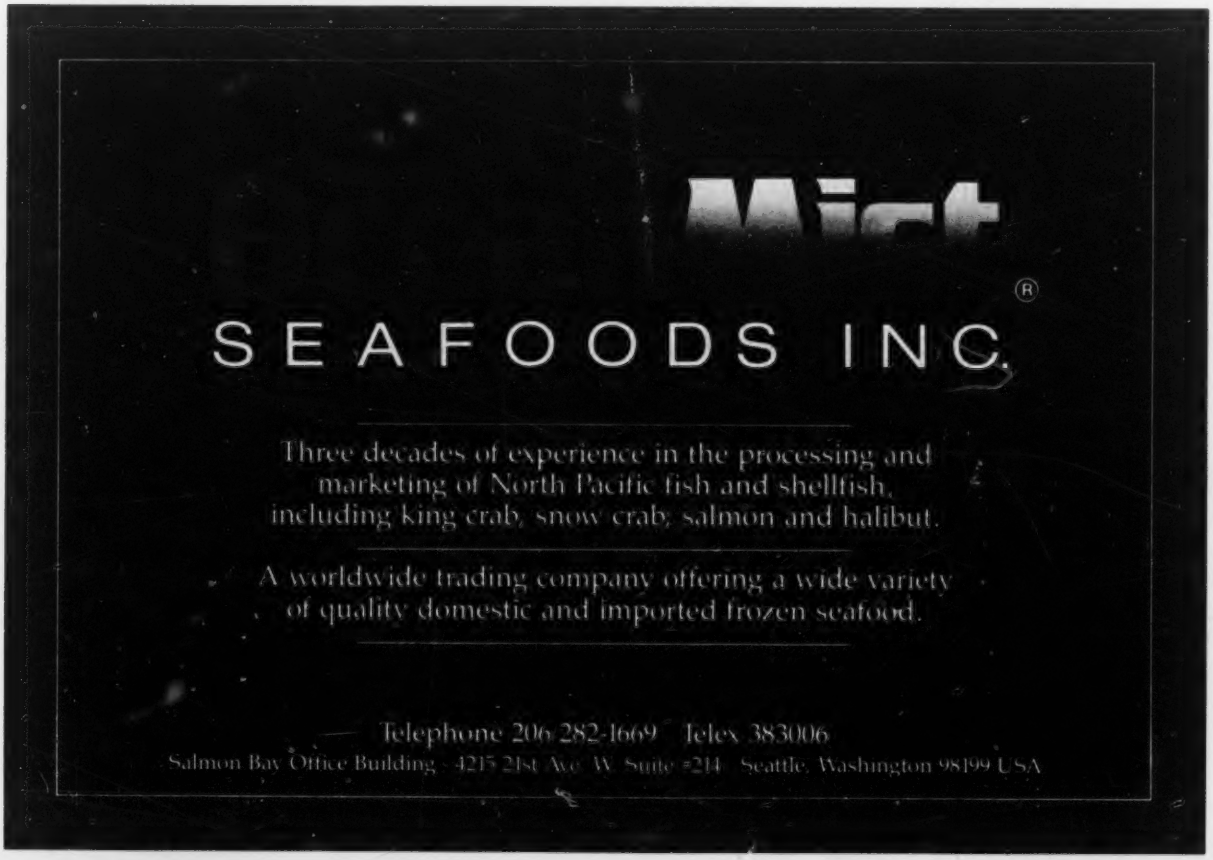
AREA	OPEN PERIODS					CATCH LIMITS (OF POUNDS)
2A	July 10-22;	Aug. 5-17;	Sept. 12-24			550
2B	May 2-10;	June ***-21;	Aug. ***-25			11,500
2C*	May 4-5;	June 1-3;	Sept. 2-3;	Sept. 30-***		11,500
3A	May 4-5;	June 1-2;	Sept. 2-3;	Sept. 30-***		31,000
3B**	May 4-5;	June 1-2;	Sept. 2-3;	Sept. 30-***		9,500
4A	May 4-5;	June 1-2;	Aug. 15-17;	Sept. 2-3;	Sept. 15-***	1,750
4B	May 4-5;	June 1-2;	Aug. 15-19;	Sept. 2-3;	Sept. 15-***	1,750
4C	June 21-*** (one day open, one day closed)					600
4D	Aug. 13-20; Sept. 15-***					600
4E	June 1-*** (two days open, one day closed)					75
TOTAL						68,825

* The scheduled June opening may be reduced to one day to provide for a September opening.
** Area 3B will close with Area 3A when the 3A quota is taken and re-open on the next scheduled opening.
*** Dates to be announced by the Commission.

find themselves a new fillet, but this buyer thinks it's only a matter of time. "There's other fish out in that ocean. A perfect example is orange roughy. Three to five years ago no one knew what it was. Now it's on menus and in stores everywhere."

"If a lot of cod comes out of Eastern Canada, then prices will go down," says a factory-trawler sales rep. However, West Coast fish houses don't foresee a repeat of the 1984 and 1985 seasons, when they were forced to dump layerpack at a loss. "Even if Atlantic cod stocks do come back, the status of pollock is never going to return to what it was a year ago," says Evans. "Pollock, *Alaska* pollock, is establishing itself as the first substitute for cod."

— Kris Freeman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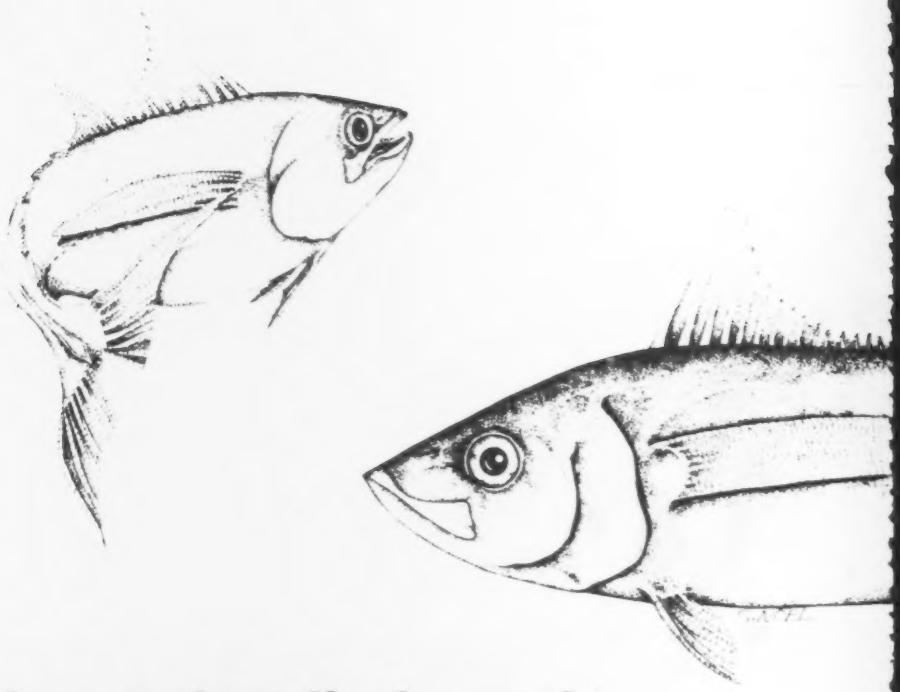

Tuna market strong despite imports

Americans consume more canned tuna than any other species of seafood in any form — about three and a half pounds a year for every man, woman, and child in this country. Demand continued to increase throughout 1986.

The U.S. produced about 71 percent of what it used last year, but 1986 imports of canned tuna reached 234 million pounds, a jump of more than nine percent over 1985 imports. Most of this increase moved into the institutional market.

The seine fleet of San Pedro reported good catches in the eastern Pacific in 1986, but low cannery prices. Production slipped in December, when the quota of porpoise kills was met, and several vessels tied up until the new year.

Demand for canned tuna remained high in 1986, according to Ed Ryan, vice president of business development for Star-Kist Foods, one of the three largest tuna processing firms in the country. Ryan reported a two percent increase in overall sales. The case price for chunk light tuna has remained steady at $25.50 to $27 for nearly a year.

The foreign competition that caused San Pedro's tuna canners to close shop and relocate overseas in 1983–84 is now biting into the domestic market for fresh and frozen albacore. This relatively new market consists of high-ticket restaurants and gourmet retail outlets that are looking for high-quality fresh or frozen-at-sea albacore.

Continental Imports of Fresh and Frozen Tuna

(MILLION POUNDS)

YEAR	ALBACORE	UNSPECIFIED*	SKIPJACK	YELLOWFIN	TOTAL
1985	141.6	4.3	154.0	86.9	386.8
1986	161.7	3.2	184.0	108.3	457.2

*Mostly bluefin
Source: NMFS

United States Tuna Pack

(IN THOUSAND CASES)

	WHITEMEAT	LIGHTMEAT	TOTAL
1985	7,819	19,502	27,320
1986	8,021	24,585	32,606

Source: NMFS

But instead of the 40-cent-an-hour labor that undermined U.S. prices several years ago, the culprit now in the eyes of U.S. producers is the low wholesale price offered by the Japanese on their product.

Japanese albacore loins sold for 25 cents to $1 a pound less than local fish last year, says Michele Tennyson, project director for the Albacore Marketing Program and owner of a marketing consultancy in Portland, Oregon.

"The Japanese saw the success of the alternative albacore market and stepped right in," she says. "Their product is great, too, especially because the fish are large [30 to 60 pounds] and can be easily steaked. That's difficult with smaller [12- to 30-pound] local albacore."

Coastal landings of albacore were low from Mexico to British Columbia last year. Catches improved 1,000 miles offshore, but much of that catch was transshipped to distant canneries.

The local albacore that sells despite foreign competition is the fish that gets kid-glove treatment on board. Purveyors are now imploring fishermen to bleed and blast-freeze the tuna as soon as it is landed, and fishermen are responding. Quality has improved as a result.

Part of this improvement can be measured in increased sales of sushi and sashimi, traditional Japanese preparations of raw fish that require high-quality fresh tuna. Some Los Angeles markets have reported a jump in sales of 20 to 25 percent during the past year.

Hisato Doizaki, fish buyer at American Fish Company, a major distributor of sashimi-grade tuna in Los Angeles, says business is "better than ever." Doizaki claims the market has expanded from Japanese restaurants to American, French, and Italian eateries where sushi is served as an appetizer.

The quality of local tuna (mostly bluefin caught within 100 miles of Los Angeles) was particularly good this year, says Doizaki.

"Four or five years ago, fishermen didn't care about quality," Doizaki says. "Now, they're taking care of the tuna, gutting and chilling them immediately."

Frank Iacono, spokesman for the San Pedro Fishermen's Cooperative Association, a marketing co-op for the San Pedro tuna fleet, says about 500 tons (or 10 percent of the 1986 local tuna catch) was sold for sushi. Wholesale prices ranged from $7.50 to $10 per pound, with prices firming as product became scarce in late winter.

— Mick Kronman

U.S. Cannery Receipts

(SHORT TONS)

	1985	1986
California, American Samoa	13,115	14,860
Puerto Rico	23,495	22,454
TOTAL	36,610	37,314

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